Iran Update

Iran Update, July 15, 2025

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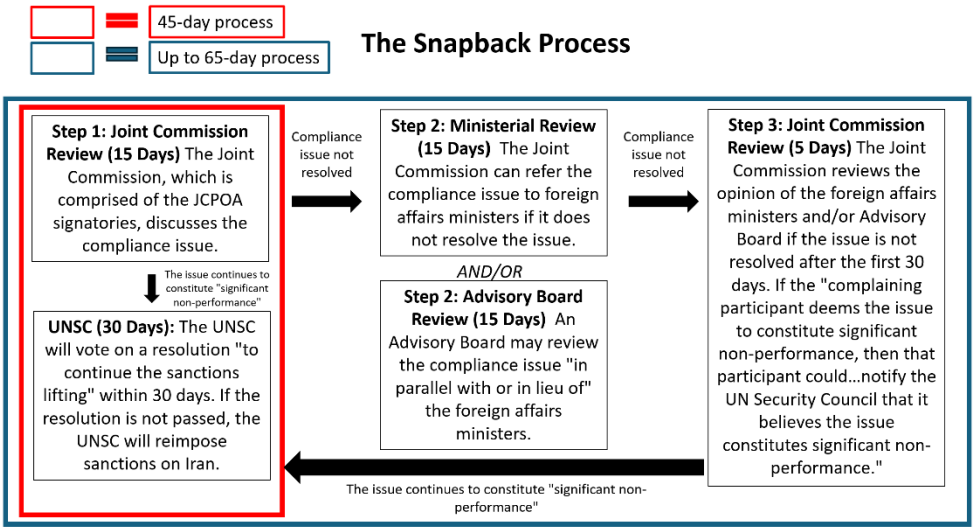
Iran may be prioritizing deeper strategic ties with China over its current partnership with Russia, though the extent of China's willingness to support Iran remains unclear. Iranian hardline outlet Farhikhtegan reported on July 15 that Iran is frustrated over Russia's "cautious stance" during the 12-Day War.[1] The outlet stated that Iranian officials believe that Russia misinterpreted the war as a localized conflict between Iran and Israel rather than a "broader NATO confrontation."[2] Farhikhtegan reported that Foreign Affairs Minister Abbas Araghchi's visit to Moscow on June 23 pushed Russia to more strongly condemn Israeli strikes, including at UN Security Council meetings.[3] Iranian experts told Farhikhtegan that Iran will likely maintain ties with Russia but must "rethink parts of the relationship and expand cooperation with other partners," especially in "sensitive military and strategic areas."[4] Reuters previously reported on June 23 that Iran was unsatisfied with Russia's support for Iran during the Israel-Iran War, citing unspecified Iranian sources.[5]

Iran appears to be trying to strengthen military and defense cooperation with China following the Israel-Iran War.[6] Iranian Defense Minister Brigadier General Aziz Nasir Zadeh met with his Chinese counterpart on June 26 during a Shanghai Cooperation Organization (SCO) summit in Beijing, reportedly to discuss potential military purchases, including J-10 fighter jets and advanced AWACS systems.[7] Arab media claimed on July 9 that China sent surface-to-air missile systems to Iran in late June to replenish its degraded air defenses after Israeli strikes, although Chinese and Iranian officials denied the report.[8] These developments reflect Iran's efforts to diversify its defense partnerships after dissatisfaction with Russia's limited wartime support and delays in delivering S-400 systems and Su-35 aircraft.[9]

Araghchi held a meeting with Chinese President Xi Jinping on July 15 on the sidelines of an SCO ministerial meeting in Beijing.[10] Xi also met with Russian Foreign Affairs Minister Sergei Lavrov on the sidelines of the SCO meeting.[11] Araghchi delivered a speech at the summit and proposed initiatives to strengthen regional cooperation, including the creation of a permanent security mechanism, a center to counter sanctions, and a regional security forum to address shared threats.[12] The permanent security mechanism proposal likely reflects Iran's dissatisfaction with Russia's support during the war. The Russo-Iranian strategic cooperation agreement lacks a mutual defense guarantee, unlike the cooperation agreement between Russia and North Korea.[13]

Iran has lastly signaled that China could play a more significant role in future nuclear negotiations. Farhikhtegan reported on July 14 that Iran would consider Norway or China as mediators to replace Oman in future nuclear talks with the United States.[14] Iranian Foreign Affairs Ministry Spokesperson Esmail Baghaei separately highlighted China's potential "significant and constructive" role in nuclear diplomacy and in rebuilding Iran's economy under the 25-year partnership agreement, which Iran and China signed in 2020.[15]

Iran is threatening to expand its nuclear program, likely in an attempt to deter snapback sanctions. The Joint Comprehensive Plan of Action (JCPOA) snapback mechanism allows JCPOA signatories to reimpose UN Security Council sanctions on Iran in the event of "significant non-performance by Iran of JCPOA commitments."[16] Islamic Revolutionary Guards Corps-affiliated media published an article on July 15 outlining potential Iranian responses to snapback sanctions.[17] The responses included increasing uranium enrichment levels from 60 percent to 90 percent weapons-grade uranium, deploying more advanced centrifuges, expanding nuclear research and development, and developing uranium metal production chains. These threats come after E3 (the United Kingdom, France, and Germany) officials have resurfaced threats to trigger the snapback mechanism if Iran fails to make verifiable commitments related to its nuclear program.[18] French Foreign Minister Jean-Noel Barrot told reporters on July 15 that the E3 will trigger the snapback mechanism "by the end of August at the latest" if Iran fails to make a "firm, tangible, and verifiable commitment."[19] The snapback mechanism under the JCPOA expires on October 18, 2025. The process to impose snapback sanctions takes between 45 and 65 days from when the initial non-compliance complaint is issued, which means that the E3 would have to initiate the process no later than September 3.[20] The graphic below outlines the processes by which the E3 could impose snapback sanctions on Iran. The quickest process would take a minimum of 45 days, while the lengthiest process would take 65 days.



Each step in the snapback process provides Iran with an opportunity to comply with its JCPOA commitments. The process for imposing snapback sanctions continues so long as Iran continues to fail to comply with its commitments.

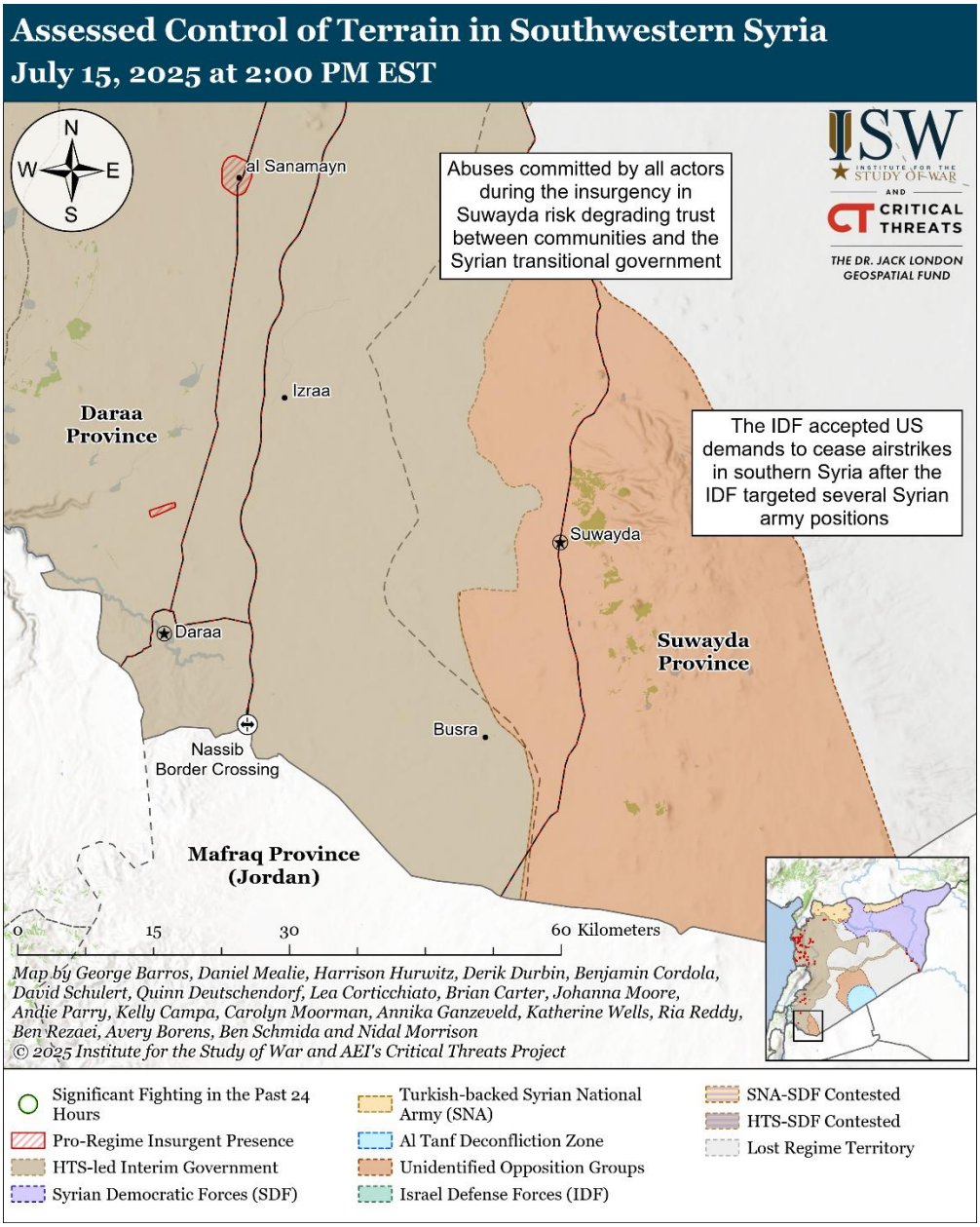
US and Israeli airstrikes have likely hindered Iran's ability to carry out these threats to expand its nuclear program, at least in the short term. The Institute for Science and Security assessed that US and Israeli airstrikes on Iran have “effectively destroyed” Iran’s enrichment program and that it will take a “long time” for Iran to restore its enrichment capabilities to pre-strike levels.[21] The strikes targeted centrifuge production facilities and active centrifuges, damaging and destroying thousands of centrifuges.[22] Israeli airstrikes also destroyed some of Iran's uranium metal production facilities, which Iran could have used to transform uranium gas into dense metal in a process called metallization.[23] This process is one of the last steps required to form the explosive core of an atomic bomb. Israeli airstrikes also targeted Iranian nuclear scientists, which will likely temporarily disrupt Iran's ability to conduct nuclear research.[24] Iran will likely try to take some of the steps outlined in IRGC-affiliated media, regardless of whether the E3 triggers the snapback mechanism, as part of its effort to rebuild its nuclear program following the Israel-Iran War.

The Institute for Science and International Security (the Institute) assessed that Israel's decapitation campaign targeting Iranian nuclear scientists “weakened Iran’s base for building nuclear weapons."[25] The Israel Defense Forces (IDF) killed at least 14 nuclear scientists during the Israel-Iran War.[26] The Institute reported on July 15 that it "may be far more difficult and take far longer" for Iran to recover from the loss of these scientists, given the scope of the decapitation campaign compared to previous Israeli killings of Iranian nuclear scientists.[27] The Institute stated that 11 of the scientists were affiliated with or senior managers at the Iranian Organization of Defensive Innovation and Research (SPND), which played a leading role in the Iranian nuclear weapons research program before 2003.[28] The Institute reported that among the 11 scientists, six had expertise in explosives, at least three were nuclear coding and simulation experts, four were experts in nuclear weapons testing, two were linked to foreign procurement networks for Iran's nuclear weapons program, three had experience in ballistic missiles, two worked on nuclear propulsion for submarines, and two conducted theoretical work on gas centrifuges.[29] Axios reported in June 2024 that Iran had begun running computer simulations that could support the research and development of a nuclear weapon, citing US and Israeli intelligence agencies.[30] The loss of these nuclear scientists may temporarily hinder Iran’s ability to conduct nuclear research and develop its nuclear program.

Abuses committed by all actors during the ongoing insurgency in Suwayda Province will likely degrade trust between communities and the Syrian transitional government, which risks undermining the transitional government's ability to establish long-term stability in Syria. These abuses, while not all inherently sectarian, will be perceived as such by Syrian minority groups and will have protracted impacts on Syria’s stability and security. Syrian Defense Minister Marhaf Abu Qasra announced a ceasefire between the Syrian transitional government and local Suwadawi leadership on July 15 and instructed Ministry of Defense (MoD) units that had entered Suwayda City to only fire when fired upon, pursue outlaw groups, protect the local population, respect property, and maintain peace.[31] Security forces deployed to Suwayda City on July 15 and established checkpoints to monitor activity.[32] Security forces engaged in numerous abuses, however, including the summary executions of civilians and Druze militiamen, arson attacks on shops, acts of pillage, and the forcible shaving of Druze men's moustaches, which have religious significance for the Druze.[33] Druze militia members have also engaged in abuses during the insurgency, such as the summary execution of security forces on July 14. These abuses further complicate the security situation and increase tensions between the MoD and Druze militias.[34]

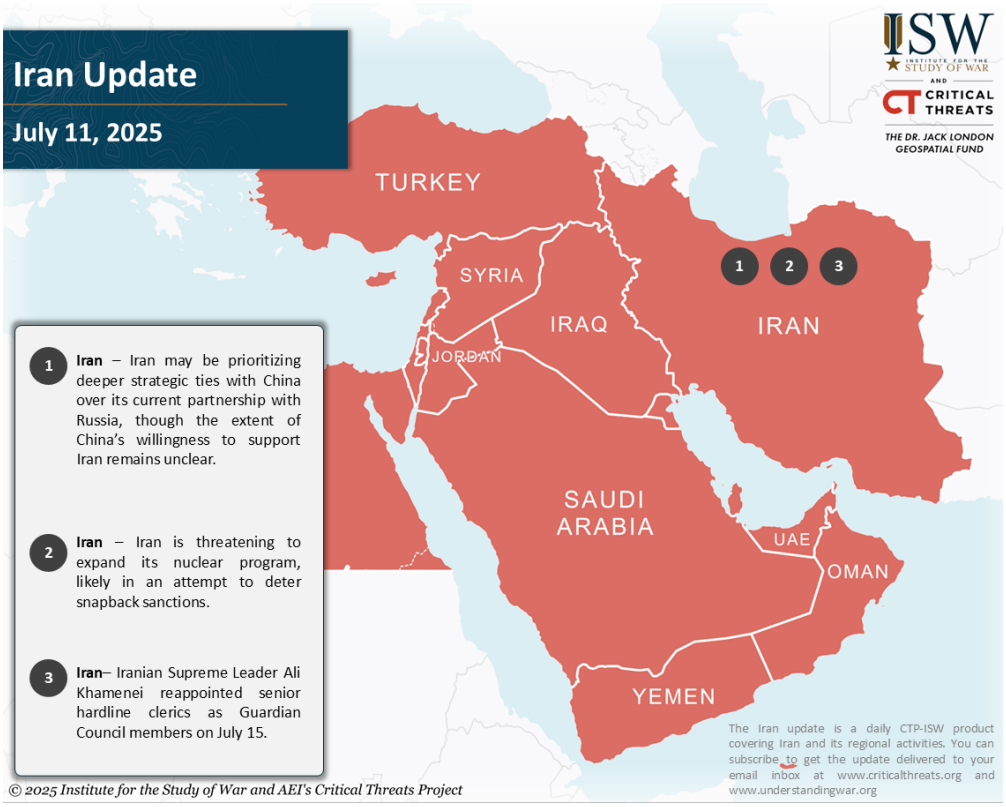
The Syrian transitional government's ability and willingness to hold security forces members accountable for crimes committed against civilians will be one factor that influences its ability to establish security and stability in southern Syria. Defense Minister Qasra announced on July 14 and 15 that the government will hold troops who commit abuses in Suwayda responsible for their actions.[35] These abuses violate the MoD's code of conduct, which applies to all military personnel.[36] The Syrian transitional government has not publicly held Syrian soldiers accountable for the massacres of Alawites on the Syrian coast in March, despite investigative reports from humanitarian groups documenting and identifying perpetrators.[37] This inaction has fueled distrust of the transitional government among the Alawite community.[38] Failing to hold security forces accountable for crimes committed in Suwayda would similarly likely increase distrust between the Druze community and the Syrian transitional government.

Some Druze factions that oppose the Syrian transitional government rejected the ceasefire between the government and Suwaydawi leadership. Suwaydawi religious and civil leaders announced a ceasefire agreement on July 15 that allowed MoD forces to enter Suwayda City.[39] Faction leaders, such as the leader of the Men of Dignity's Sheikh al Karama militia, Layth al Balous, coordinated with the MoD during the recent insurgency and supported the previous security agreement in May.[40] The Suwayda Military Council (SMC), which retains ties to Assad-era generals and is loyal to prominent Druze Sheikh Hikmat al Hijri, rejected the ceasefire and attacked MoD units entering the city.[41] Hijri initially accepted the ceasefire agreement in two published statements, but then released a third statement on July 15 in which he claimed that his earlier statements were made under duress.[42] Hijri added that the Druze face a "war of extermination" and that they must confront the "barbaric campaign with all available means."[43] Ahmed al Shara's government could build relationships with militias that agreed to the ceasefire and oppose Hijri, such as Liwa al Jibal, the Men of Dignity, and Sheikh al Karama, to isolate and ultimately defeat Hijri and the SMC.[44] Shara has employed similar tactics previously, such as when he successfully disbanded and integrated the Eighth Brigade into the Syrian government in April.[45] Druze factions have divergent political views and are not a monolith, but most have rejected the imposition of security forces from outside the province.[46] This is due to legitimate concerns about the Syrian transitional government's treatment of minorities, amplified by the massacres of Alawites on the Syrian coast in March and previous mistreatment of Druze in Rif Dimashq Province in May.[47]



The Israel Defense Forces (IDF) accepted a US demand to cease all airstrikes in southern Syria on July 15 following a series of airstrikes on Syrian transitional government military targets in southwestern Syria.[48] The IDF conducted several airstrikes in Suwayda Province on July 15 that targeted the Syrian MoD and General Security Service (GSS).[49] Israeli Prime Minister Benjamin Netanyahu and Defense Minister Israel Katz released a statement on July 15 that Israel conducted the strikes to protect the Druze minority in Syria.[50] The IDF struck MoD vehicles, tanks, and the police station in Suwayda City before and after the ceasefire between Druze notables and the Syrian transitional government was announced.[51] The Syrian Foreign Affairs Ministry condemned the strikes, calling them a blatant violation of Syria's sovereignty and a breach of international law and the UN Charter.[52] The ministry called on the UN Security Council to condemn the strikes.[53]

Saraya Ansar al Sunnah, which is a Salafi-jihadi group ideologically aligned with ISIS, threatened on July 15 to expand its sectarian attacks to include the Druze community in Suwayda.[54] The group has threatened the Druze and killed Druze civilians since it was established in December 2024.[55] Saraya Ansar al Sunnah has not claimed any attacks in Suwayda since its establishment. The group's threat may be intended to instill fear and distrust within the Druze community of transitional government forces.[56] Saraya Ansar al Sunnah's stated objective is to establish an Islamic State in Syria that excludes Alawites, Druze, Christians, and Shia.[57]



Key Takeaways:

- Iran may be prioritizing deeper strategic ties with China over its current partnership with Russia, though the extent of China's willingness to support Iran remains unclear. Iranian hardline outlet Farhikhtegan reported on July 15 that Iran is frustrated over Russia's "cautious stance" during the 12-Day War.
- Iran is threatening to expand its nuclear program, likely in an attempt to deter snapback sanctions. US and Israeli airstrikes have likely hindered Iran's ability to carry out these threats to expand its nuclear program, at least in the short term.
- Iranian Supreme Leader Ali Khamenei reappointed senior clerics Ahmad Khatami, Alireza Arafi, and Ahmad Hosseini Khorasani as Guardian Council members on July 15. All three clerics are Assembly of Experts members and belong to the hardline Society of Seminary Teachers of Qom. The Guardian Council plays a key role in Iranian elections and vets candidates and legislation, which gives these clerics significant influence over Iran's political landscape until at least 2031.

Iran

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Iraq

The United States reportedly threatened in July 2025 to sanction the Iraqi state-run State Organization for Marketing of Oil (SOMO) and block $350 million of Iraqi oil revenue if the Iraqi federal government failed to prevent Iranian crude oil smuggling.[66] Iran oversees an oil smuggling network in Iraq that generates around a billion dollars annually for Iran and its Axis of Resistance.[67] The United States announced on July 3 that it sanctioned six entities and four vessels involved in smuggling Iranian oil, which included a network of companies run by an Iraqi businessman.[68] Oil accounted for around 91 percent of Iraqi federal revenue in 2025.[69]

Likely Iranian-backed Iraqi militants conducted at least two one-way drone attacks targeting two oil fields in Iraqi Kurdistan on July 14 and 15. Unidentified actors launched two one-way attack drones targeting the Kurdish-owned Khurmala oil field in Erbil Province on July 14.[70] Unidentified actors launched a one-way attack drone targeting the US-operated Sarsang oil field in Dohuk Province on July 15.[71] Reuters reported that the drone attack on the Sarsang oil field caused an explosion, which paused production.[72] The attack came hours before the oil field's operator, US-based private company HKN Energy Limited, and the Iraqi government signed a preliminary agreement for HKN Energy Limited to invest in another oil field. Likely Iranian-backed Iraqi militias have conducted several attacks targeting US positions in Iraq in recent weeks. Iranian-backed Iraqi militias have not claimed any of these attacks.

The suspected Iranian-backed Iraqi militia attacks have coincided with key political and diplomatic developments within the Iraqi federal government. The loosely aligned pro-Iran Shia Coordination Framework has been exploiting various legal and illegal means to sideline Iraqi political opponents in the lead up to the November 2025 elections to secure a parliamentary majority. Iranian-backed Iraqi militias previously conducted rocket attacks on Kurdish oil and gas fields between March and June 2022 to pressure Kurdish parties to withdraw their support for Iraqi Shia nationalist cleric Moqtada al Sadr. This strategy sought to deprive Sadr of allies to secure a majority in parliament.[73] Kurdish parties, including the Patriotic Union of Kurdistan (PUK), aligned with the

Shia Coordination Framework following Sadr's failure to form a majority coalition and subsequent withdrawal from parliament.

Sadr disavowed 31 members of his Shia Nationalist Movement (formerly the Sadrist Movement) on July 13 due to their participation in the upcoming elections.[74] Sadr announced in March 2025 that his political party would not participate in the upcoming November 2025 parliamentary elections, although there has been speculation among Iraqi politicians that Sadr could sway voters through policy or candidate endorsement.[75] A close associate of Sadr reported on July 13 that Sadr asked about candidates and blocs running in the upcoming elections on agendas like Sadr's, such as promoting Iraqi independence, dismantling the Iranian-backed Popular Mobilization Forces, and cracking down on corruption.[76]

Syria

See topline section.

Arabian Peninsula

The Israeli Air Force intercepted a Houthi drone before it crossed into Israeli territory on July 15.[77] The Houthis have not claimed the attack at the time of this writing. The Houthis have launched hundreds of drones and ballistic missiles targeting Israel since the Houthis began their campaign to enforce an economic blockade on Israel in October 2023.[78]

The Palestinian Territories and Lebanon

The IDF struck Hezbollah Radwan Force training camps and weapons depots in the Wadi Fara area of Lebanon's Bekaa Valley on July 15.[79] The strikes reportedly killed 12 individuals, making these strikes the deadliest IDF airstrikes in Lebanon since the Israel-Hezbollah ceasefire went into effect in November 2024.[80] The Radwan Force is Hezbollah's special operations forces unit that is designed to conduct offensive ground operations into Israel.[81] Hezbollah reportedly used the Radwan camps to train fighters to plan and execute "terror operations" against the IDF and Israel.[82] Israeli ground operations in southern Lebanon between October and November 2024 destroyed key Hezbollah assets in southern Lebanon, such as tunnels that could support ground attacks into northern Israel.[83] The IDF has continued to conduct airstrikes on the Radwan Force since November 2024.[84] The IDF said that Hezbollah Radwan units have been working to restore their capabilities since September 2024.[85] Israeli Defense Minister Israel Katz said that the strikes were a "clear message" to Hezbollah against rebuilding the Radwan Force.[86] Hezbollah condemned the strikes, describing them as a "major escalation."[87] Hezbollah said that the strikes will make Lebanese civilians more committed to "resistance" as a "necessary option."[88]



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